# ShoreWare® Mobile Call Manager User Guide

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# INTRODUCTION

ShoreWare Mobile Call Manager (MCM) is a Java (J2ME) application that runs on a mobile device such as a BlackBerry, for example, and enables the device to function as a ShoreWare extension while on the go.

In addition to initiating calls from the Call History, Voice Mail, and QuickDialer screens, the MCM software provides an interface similar to ShoreWare Personal Call Manager (PCM), and offers a subset of the functions available in PCM. You can access your voice mail messages, configure Call Handling Mode settings, and configure Office Anywhere settings from your mobile device via the MCM interface.

## Supported Mobile Devices

MCM is supported on the following devices:



**BlackBerry 8700**                    **BlackBerry 7290**

**NOTE**   MCM is currently supported in English only.  There is no support for other languages at this time, nor for extended character sets. The MCM application <u>can</u> be used outside the United States in countries that do not predominantly speak English, but all MCM text will appear in English (regardless of the language of the BlackBerry operating system).

**NOTE**   MCM is supported across carriers that support installation of third-party applications on the BlackBerry device.

# INSTALLING THE SOFTWARE

Before you can use MCM on your mobile device, you must install the MCM Client Installation Files. These files enable the MCM client application to run on your mobile device and facilitate communication between your device and the MCMS (a software component located on the main and distributed ShoreWare servers).

You can download the MCM Client Installation Files from the ShoreWare Server.

After these files have been installed on the device, you can configure the mobile device to access the ShoreWare server through an IP address. Please contact your system administrator for this IP address.

## Downloading Files

To install the MCM client software on your mobile device:

**Step 1**    Open a browser on your mobile device.

**Step 2**    Enter the IP address or URL of the server that downloads MCM Client Installation Files. This URL typically appears similar to the following:
http://shoreware/mcm/client

Please consult with your system administrator to verify the accuracy of this URL or to obtain a valid IP address for the server.

**Step 3**    The ShoreTel MCM Installation screen appears, as shown below:
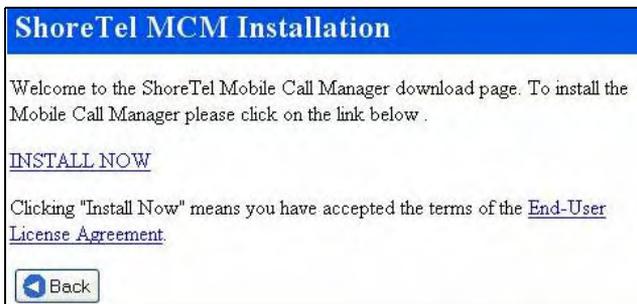


**Step 4**    Read the "End User License Agreement" and then click the **INSTALL NOW** link.

A screen similar to the one shown below appears. This screen lists the supported devices.



**Step 5**   Select the link that matches your mobile device.

The MCM Client Installation Files are downloaded to your device.

# LOGGING INTO MCM

After installing the MCM client application on the mobile device, you can access MCM from the Application menu by selecting the ShoreTel icon.

A Welcome screen appears, after which you will see the following screen prompting you for several pieces of information. Talk with your system administrator if you have any questions about what to enter on this screen.



Step 1    Enter the IP address of the server through which the mobile device will access the MCMS (server application).

Step 2    Enter the port number of the server through which the mobile device can access the MCMS.

Step 3    Enter your extension.

Step 4    Enter your password, which is typically the same as your voice mail password.

When MCM is properly configured, the device displays the "Welcome to the MCM Application" screen. Press the track wheel and then click **Next** to display the Main Menu screen (shown below).

Unheard voice messages

Number of missed calls

Current Office Anywhere setting

Current Call Handling Mode
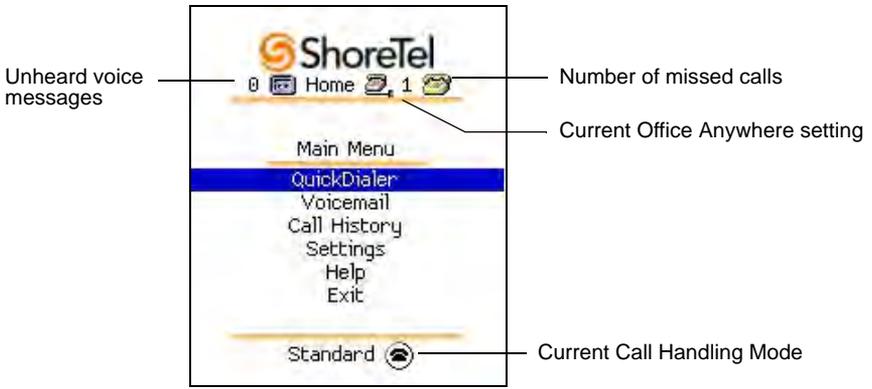
**NOTE** If you frequently access MCM from a BlackBerry, you may find it helpful to program the "Convenience Key" or a "Quick Start Key" to launch MCM when pressed. You can accomplish this task via the BlackBerry interface by going to **Options > Screen/Keyboard > Convenience Key Options >** and then selecting **Mobile Call Manager.**

# COMMON OPERATIONS

From the Main Menu screen (shown  above), you can access the most frequently used MCM functions. Use of these functions is described in greater detail below.

## Integrating Address Book Contacts

When a BlackBerry logs into MCM, the device might ask[1] if you would like to integrate contacts stored in the BlackBerry address book with the contacts stored in your ShoreWare directory:

"The application Mobile Call Manager has attempted to read your user data. Would you like to allow this?"

- If you click **Yes**, this will result in QuickDialer queries returning entries from your ShoreWare directory and from the BlackBerry address book.
- If you click **No**, this will result in QuickDialer queries returning entries only from your ShoreWare directory.

When you select Yes, MCM loads the BlackBerry contact information, where it is accessed through QuickDialer operations.

Large BlackBerry address books may take several seconds to load, so you may want to wait until the operation is complete before attempting to use the QuickDialer function, otherwise results will only include entries from the ShoreWare directory.

**NOTE** If you see the Contact Integration prompt every time you start the MCM application and you wish to change this behavior, we suggest using the "End Call" key (instead of the "Black Arrow" key). The "End Call" key has the advantage of moving the MCM application to the background without really closing it. You can bring the application back to the forefront at a later time by clicking the MCM logo or using a pre-programmed shortcut key. Since this is not a true "restart" you will not see the contact integration prompt.

**NOTE** Unanswered calls will go into your ShoreTel voicemail system. Calls that you deliberately ignore (by pressing the associated button on your device), will be sent to your carrier voicemail system. (This is only true if "Wait for DTMF" is not selected.)

**NOTE** If the active Call Handling Mode is configured to send calls to your mobile phone number (i.e. not your ShoreTel extension), then unanswered calls will be sent to your carrier voicemail system.

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1. Behavior varies among different devices and software versions.

# Using QuickDialer

The QuickDialer function displays contact information and initiates phone calls without requiring you to enter the complete contact name or number.

**Phone Number Retrieval**

You can perform a QuickDialer retrieval by entering the name or number of the person you are trying to call, pressing the track wheel, and selecting **Update**.

When entering names, you can search for the first or last name, but you must begin with the first letter in that name. For example, to search for "Brian, " you could enter "B-R-I", but if you entered some letters in the middle of the name,  like "I-A-N", your search would not succeed.

The device displays entries whose First Name, Last Name, extension number, or external contact number match the characters you entered.

NOTE  If you do not see the name of the person for whom you are searching, you can press the track wheel and select **More** to retrieve another block of entries that match your entry.

**Calling a Retrieved Number**

Once you have located the proper name or number, you can initiate a call by scrolling to the desired name or number, pressing the track wheel, and selecting **Call** by pressing the track wheel again.

NOTE  Office Anywhere must be set to the number associated with your mobile device to get the call on your mobile device. If you try to initiate a call from the mobile device and Office Anywhere is assigned to your home/desktop phone, then the call will go to *that* phone instead. (See "Configuring Office Anywhere" on page 15 for details.)

NOTE  We recommend turning off "Wait for DTMF" for Office Anywhere. This will cause the system to pass the call directly to your mobile device while obviating the need to confirm with the ShoreTel system that you will accept the call. If "Wait for DTMF" is enabled, then you will have to confirm with the ShoreTel system that you will accept the call before the call is sent to your mobile device (which some users may find a bit cumbersome).

## Accessing Voice Mail

The Voice Mail message list displays the contents of your mailbox along with the following information for each message:

- Caller ID (name and number, if available)
- Date and time of receipt
- Duration (length of message)
- Played/unplayed status

The list displays a voice mail icon with each message. If this icon appears grayed-out, this indicates that the message has been played.

Messages are listed in the order received, with the most recent message on top. MCM periodically checks the voice mail server for new messages and updates the list on your device. The number of entries that the device initially downloads depends on how you have configured the Network Speed setting. (See "Setting the Network Speed" on page 17 for details.)

The following actions are available for the selected message:

- **Play Preview:** This action plays the first few seconds of the message on the mobile device. (Not supported on 7290 model.) Previewing a message does not change the played/unplayed status of the message.
- **Delete:** This action moves the message to your ShoreTel system's Deleted Items folder. Messages in your system's Deleted folder can be recovered to the folder from which they were removed. To permanently remove a message, delete it from the Deleted folder.
- **Play Full Voice Mail:** This action plays the message on the mobile device.
- **Call Sender:** This action initiates a call to the address from which the message was sent. This action is available only for messages that are associated with a valid Caller ID.

NOTE   Office Anywhere must be set to the number associated with your mobile device in order to hear messages on your mobile device. If Office Anywhere is assigned to your home office or desktop phone, then messages will be played on *that* phone instead of on your mobile device. (See "Configuring Office Anywhere" on page 15 for details.)

NOTE   We recommend turning off "Wait for DTMF" for your Office Anywhere number in order to avoid delays from the time that you answer the call and voice transmission.

NOTE   If "Wait for DTMF" is on and you dismiss/hang up an incoming call, the call is sent to the ShoreTel voice mail system. However, if "Wait for DTMF" is turned on, then the call will be sent to your carrier's voicemail system.

NOTE   If your mobile device is turned off, incoming calls are sent to your ShoreTel voice mail system.

# Checking Call History

This call history screen displays the ten most recent calls (inbound and outbound), with the most recent call listed first. Each entry provides the following parameters about the corresponding call:

- Caller Name and Number, (if both are available)
- Date/Time of Call
- Duration of Call

In addition to this information, you may also see Call History icons next to the call information. The Call History icons are shown below, along with definitions:

| | |
|---|---|
|  | Incoming call |
|  | Outgoing call |
|  | Missed call |
|  | Conference call |

To dial the contact specified by a Call History entry, select the desired call and press the track wheel to select the **Call** soft button.

# CONFIGURING SETTINGS

The Settings screen, shown below, is accessed by selecting **Settings** from the Main Menu screen.



The settings screen allows you to access and configure the following parameters for MCM and the device:

- **Call Handling Modes**: This menu allows you to set Call Handling Mode parameters.
- **Office Anywhere**: This menu allows you to specify the Office Anywhere external number and specify whether or not you want to enable or disable "Wait for DTMF." (For most users we recommend disabling "Wait for DTMF.")
- **Default Start Page**: This menu allows you to select which initial screen is displayed by the device when you open MCM.
- **Network Speed**: This menu informs your device about the speed of the network you are on, which then influences how much data your mobile device retrieves in one transmission (i.e. when you request a QuickDialer, Voice Mail, or Call History update).
- **Reset**: This option removes your MCM information from the device. (You should not need to modify this setting under normal operating conditions.)

## Setting the Call Handling Mode

To configure any of your five Call Handling Modes, select **Settings** from the Main Menu, and then select **Call Handling Modes**.



Scroll to the desired Call Handling Mode and press the track wheel to select it.

## Configuring Office Anywhere

The MCM program operates separately from your mobile device's regular calling mechanism. When MCM is active, the mobile device maintains its ability to send and receive calls independent of MCM.

To route all calls to your mobile device, you must set Office Anywhere to "External Assignment" with the External Number set to that of the mobile device. If this is not done and Office Anywhere is set to "Home Assignment", then calls initiated through MCM on the mobile device will be routed through your desktop phone.

To change the Office Anywhere setting to External Assignment:

**Step 1** Navigate to the Main Menu, press the track wheel and select **Set Office Anywhere**.

**Step 2** Scroll to **External Assignment** and press the track wheel.[2]

**Step 3** Enter the external number (i.e. the phone number associated with this mobile device). All calls will be forwarded to the phone number you enter here.

**Step 4** Press the scroll key and select **Next** to complete this operation.

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2. To disable Office Anywhere, select "Home Assignment".

## Setting the Default MCM Start Page

You can customize MCM on your device by selecting a default start page. From the Settings screen, select **Default Start Page** to display the screen shown below.



Scroll through the available start pages and select the one you desire by pressing the track wheel.

## Setting the Network Speed

The Network Speed menu allows you to specify the speed of the network to which your mobile device has access. This information is then used by the device to determine how much data it retrieves when you request a QuickDialer, Voice Mail, or Call History update.

You can set this parameter to slower speeds in order to have the device download less information per update (thus reducing wait times). Alternatively, you can set this to a faster setting if you are on a high-speed network (which will result in your receiving larger downloads when performing updates).[3]



- **Low (Slow 2/2.5G/CDMA) –** device receives a block of 10 entries from server
- **Medium (Fast 3G) –** device receives a block of 25 entries from server
- **High (High Speed/Wi-Fi) –** device receives a block of 100 entries from server

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3. Under normal operating conditions there should be no need to modify this setting.

## Resetting MCM on Your Device

When you reset the MCM configuration, all of your MCM-related settings are removed from the mobile device. To perform this operation, select **Settings** from the Main Menu, and then select **Reset**. The following screen appears:



If you wish to use MCM after resetting the MCM configuration, you must repeat the process of logging in as a first-time user, described earlier in this guide.